REPORTS □ 13

GRANNY FLATS: A HOUSING OPTION FOR THE ELDERLY

Susan Corke
Gregory S. Romanick
Michael Lazarowich
Joan Simon

INSTITUTE OF URBAN STUDIES
UNIVERSITY OF WINNIPEG

Sue Corke

Sue Corke is a housing policy analyst with the Ontario Ministry of Municipal Affairs and Housing, Housing Renovation and Energy Conservation Unit. She has a Master's degree in Urban and Regional Planning and has been working in the area of housing stocks management for the last five years.

Gregory Romanick

Gregory Romanick, a graduate of the University of Waterloo, is a Development Planner for the City of Waterloo. He is responsible for all aspects of development in Waterloo including the review and processing of subdivisions, planning document amendments, site plans, etc. He is also involved in various policy projects related to parks and recreation, downtown revitalization and housing.

Michael Lazarowich

Michael Lazarowich is a sociologist and professor of planning in the School of Urban and Regional Planning in the University of Waterloo. He has carried out research in the areas of: social policy; programming and implementation; need assessment and program evaluation; social housing; life style and life cycle studies; housing and support services for the elderly.

Joan Simon

Joan Simon is an Associate Professor in the Department of Consumer Studies at the University of Guelph where she is responsible for creating the housing area of specialization. A practicing architect, she combines academic research with professional practice. Her particular interests are related to the behavioral consequences of the built environment.

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PREFACE

The University of Winnipeg was the location of a major national urban studies conference, hosted by the Institute of Urban Studies in August 1985. The "Canadian Urban Studies Conference" addressed the general theme of "The Canadian Urban Experience - Past and Present." More than ninety specialists spoke during forty separate sessions on such topics as housing and the built environment, economic and community development, planning and urban form, women and the urban environment, and urban government and politics.

This publication is a result of the Canadian Studies Conference. The Institute of Urban Studies is publishing many of the papers presented at the conference in the Institute's publication series. Some of the papers will also appear in the scholarly journal, the Urban History Review/ Revue d'histoire urbaine and in book form.

This conference represented a major effort on the part of the Institute of Urban Studies in terms of fulfilling its role as a national centre of excellence in the urban studies and housing fields.

Alan F.J. Artibise
Director.

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INTRODUCTION

Granny flats were the subject of a workshop offered at the Canadian Urban Studies Conference, held at the University of Winnipeg, August 1985. Susan Corke, Research Officer with the Ontario Ministry of Municipal Affairs and Housing, provided the provincial government's perspective on granny flats, while Gregory Romanick of the City of Waterloo's Planning Department discussed municipal mechanisms for the development of granny flats. Michael Lazarowich of the School of Urban and Regional Planning, University of Waterloo has been assessing Ontario's granny flat demonstration project to determine user need and satisfaction, and shared his findings. Joan Simon of the Department of Consumer Studies, University of Guelph, presented the prototype granny flat unit which she designed. This report is a collection of the papers presented at the workshop.

GRANNY FLATS AS AN INTENSIFICATION OPTION FOR HOUSING THE ELDERLY

by

Susan Corke

1.0 INTRODUCTION AND CONTEXT

For several years, the Province of Ontario through its Ministry of Housing has been active in exploring the potential of residential intensification as a strategy for meeting a variety of housing and neighbourhood policy objectives. This policy interest has occurred against a backdrop of increasingly aging housing stock and infrastructure, and slow or no economic and population growth in the larger urban areas. It has been part of an implicit strategy of urban consolidation in these areas rather similar to, if not as extensive as policy directions in other developed metropolitan countries. This assorted collection of policies and projects or programs falls under the general slogan of "Making Better Use of the Existing Housing Stock" which is the title of a very comprehensive literature review on the subject which David Hulchanski undertook for the Ministry of Housing three years ago.

Generally, the objectives which have been of most concern to the policy analyst have been: reinvestment in viable neighbourhoods at risk because of changing function and demographics; capitalizing on the potential for cheap rental housing production from existing residential or non-residential buildings; and more lately, increasing the flexibility of the stock and infrastructure, particularly the regulations governing their use, in order to meet the needs of special interest groups. This latter objective has tended to focus almost

entirely on elderly persons largely because it is felt that any inroads to be made in the field of regulatory change would be done more easily for persons considered non-threatening. The thin end of the wedge having been secured, then it would be more possible to extend the concepts and advances to other special needs groups such as the disabled and those with chronic affordability problems.

It is within this general context of increasing the flexibility of use of the built environment for the purposes of meeting special needs that the granny flats concept can be located. Of course, this kind of abstraction is somewhat artificial - others in the ministry might tell you that increasing seniors' housing options is the driving motivation behind the development of the concept; or that the need for product development initiatives within the manufactured housing industry was really the key goal. In rural areas, they might tell you that granny flats will take the pressure off requests for rural land severances, thereby preserving the integrity of agriculture land policies. This diversity of policy settings just reinforces the attractiveness of the concept to careworn but pragmatic politicians who are of necessity looking for some good news to suit everyone, and it goes some way towards explaining why the concept has received so much positive but unsolicited media attention.

2.0 THE CONCEPT IN ONTARIO

The way in which granny flats are conceived as an intensification activity is through their treatment as temporary back or sideyard infill. They use existing residential land, and existing hard and soft services. All that is new is the unit itself. In England, the concept of granny annexes, which is similar in intent, uses part of the existing house, converting it to a self-contained rental unit. This is akin to the accessory apartments concept, so widely publicized by Patric Hare in

the United States and which we tried very hard to emulate in our Add-A-Unit demonstration project. It was the absence of success with this concept that encouraged us to look at a different model - the infill model.

The definition of the granny flat in the Ontario demonstration project is as follows:

- It is occupancy-tied. The unit may only be used by the specified occupant, who must be a parent or parent-in-law of the host household. One or two occupants are permitted. The reasons for tying down the occupancy issue are fairly obvious. In anticipation of neighbourhood objection to what might be perceived as the intensification of single family housing through the back door, it is important to reassure neighbours and those in charge of rezoning that the occupants are honourable and wholesome, and will not permanently change the flavour of either the neighbourhood or perceived property values.

- It is both temporary and portable. If the unit is occupant-tied, and if the occupant is unlikely to be there for more than a decade (seven years is the Australian average), there must be re-use potential elsewhere. Hence, the technology becomes an important part of the experiment.

- It must be aesthetically compatible with its host house and neighbourhood. This is to maximize acceptance. Not only technology, but also design issues become of major importance as a result of this factor.

- It must be self-contained and detached. As a result of our Add-A-Unit project, we concluded that the preservation of privacy and independence are at least as important, if not more important to the occupant than proximity.

The Ontario demonstration has been designed according to these parameters. Because the only precedents for the introduction of the granny flat concept have been so different in implementation than we envisaged here in Ontario, we have had to be very creative in designing

the rules and the mechanisms for putting plans into practice.

In Australia, for instance, the granny flat is part of the public housing inventory in the State of Victoria. Rents are geared to income; and the state government has enacted blanket state-wide legislation permitting the placement of their units on the lot of any successful applicant. Our concept, in its formative stages, has been conceived as a non-subsidized alternative, addressing specifically those needs of elderly households which are not related to affordability. Secondly, our concept has to make do with whatever legislation is currently in place until such time as its future is ascertained. The luxury of placement by fiat is replaced by the painful process of site specific rezoning applications.

In the United States, the experience such as it is with granny flats points to a number of pitfalls which must be avoided but provides no real guidance for proceeding. The biggest lesson from the American experience is that there must be a strong government role to absorb the developmental costs and the initial risk, regardless of whether the concept becomes the property of government. Regulatory change, legal supports, marketing supports, technological supports, all need to be championed by an organization with an eye to other longer run objectives than the profit margin at year end.

Armed with just a few pointers and a lot of faith, we moved into the project design phase. This was almost a balancing act to accomplish: how to satisfy the multiplicity of policy objectives, the rigorous devotion to low budget options held by our previous political masters, and the need for maximum municipal flexibility as expressed by our demonstration participants.

3.0 PROJECT DESIGN

The project is designed in four phases:

- Phase I is the preparatory phase. At the end of one year, the tangible goal is to locate and install 12 portable living units for seniors (PLUS units) in the backyards of 12 willing hosts. Three demonstration areas are involved in this exercise - the Regions of Sudbury and Ottawa-Carleton, and the area municipality of Waterloo. Altogether, this could total as many as nine municipalities. Phase I is scheduled to end in September 1985. It has been more complicated and time consuming than anyone could possibly have guessed. Probably only eight units will have been located by then, although we have not given up hope of getting all 12 on the ground by the end of October.

- Phase II is the Living Laboratory, and constitutes the three years of the province's commitment to the project. During this time we will interview hosts and occupants and attempt to ascertain a number of facts including the unit's performance and the occupant's overall satisfaction with both unit and lifestyle, and impact on the neighbourhood.

- Phase III occurs in parallel with Phase II and constitutes the interim evaluation, beginning as soon as applicants are installed and ending eight months later with policy and program recommendations to guide the balance of the provincial commitment.

- Phase IV begins in the summer of 1986 and consists of obtaining consensus from management and participants in the demonstration as to program redefinition and changes in direction. Examples of the sort of redefinition we might expect depend upon political directions received as to the intended nature of the units. Under our original instructions, the implicit outcome was some sort of private sector development initiative, with the administrative and regulatory strings being held by a non-profit body other than the provincial government. The balance of the two years of provincial commitment would then allow for plenty of transition time and would ensure continuity of administration for the existing units as well as providing for additions to inventory, if required.

4.0 PROJECT IMPLEMENTATION: RULES AND MECHANISMS

It is important to discuss Phase I - the Preparatory Phase - in more detail, and describe some of the issues which have been raised and some of the proposed solutions. We began this project knowing that we had several complicated tasks ahead to ensure the integrity of the demonstration and to give the project both the best chances of success and the richest opportunities for coming to grips with potential difficulties in a real life situation. Certain prerequisites were necessary in order to remove some of the possible risks involved in working with a multiplicity of different interests. In particular, we have always recognized that to be fair to the project, an enormous commitment of staff labour would be involved. To maximize the effectiveness of this labour intensity, a groundwork of explicit commitment needed to be developed. With this in mind, detailed guidelines were developed from the outset, capturing the directives from senior management and input from all the different participants. These guidelines went through six different incarnations but were invaluable in formulating the basis for an ongoing common understanding and mutual trust. Eventually the legal contracts were based on this work. To be more specific, the guidelines laid out the rules regarding:

- definition of the granny flat;
- design and purpose of the demonstration;
- ownership of the units during the demonstration;
- maintenance and management of the units during the demonstration;
- rents to be charged and the rationale for rent setting;
- selection of applicants;
- legal and regulatory framework;
- local project management.

While we have encouraged a degree of municipal variation in interpretation, the spirit has been generally adhered to with an extraordinary loyalty.

As a second precaution to minimize risk, we insisted on a couple of formalities being in place before staff were assigned to develop the concept further. Each demonstration area chosen had to demonstrate both through their official plan and passage of a council resolution that it was committed to innovative housing options for seniors, preferably in conjunction with a parallel interest in residential intensification. Upon receipt of this council resolution, a minister's letter was issued confirming the allocation of four units to the municipality involved. Only then could the demonstration actually proceed.

The next step in each demonstration area was to establish local working committees whose responsibility it would be to locate and evaluate applicants and their sites, to ensure that there was input into the continuing decisions of the project management at Queens Park, and to bring any local concerns to the table. As each potential applicant was evaluated, the committee made a recommendation regarding the suitability of host, occupant, site and neighbourhood which, if successful, resulted in the initiation of a temporary use by-law allowing for the site specific rezoning of the lot to accommodate the unit. There were several traumatic issues which emerged during this process, which took from six to eight months in Ottawa and Waterloo, and four months in Sudbury. The most traumatic of all was the loss of applicants during the process. To date, three out of a total of approximately 25 applicants have either fallen ill or died before receiving their granny flat.

5.0 PRELIMINARY LESSONS

The biggest shock in this exercise is the cost of the units. While we are not absolutely sure what the final bill will be, it is quite clear that the early literature pointing towards $18,000 to $20,000 per unit is not appropriate for the Canadian context. Admittedly, what we have commissioned is a beautiful, high quality product, but it is our view that only such an approach could succeed given the physical climate in Canada and the neighbourhood climate. The tendered costs on the project ranged from $21,000 for a unit which met very few of the specifications set out, but shows some future product development promise, to $54,000 per unit from a company which probably did not want our business. The mid prices, once they were properly evaluated, fell into the $35,000 - $37,000 range, exclusive of installation costs which would take the price up to $42,000 per unit. Admittedly, there are no economies of scale inherent in the building of 12 units, and we could expect the price to lower considerably with a larger order. Nevertheless, it has been hard to swallow such a price shock.

The second surprises are planning and site related. The standard rezoning process required by the Planning Act takes a minimum of 60 days, assuming no objections. However, in particular municipalities this process was extended as long as five months in the case of Waterloo. Neighbourhood interviews, tea parties, and informal hearings were meticulously held in order to weed out any potential objectors. This process worked remarkably well and the rezonings went through relatively smoothly. Unfortunately, by the time the rezonings had been achieved the first set of two applicants had dropped out of the process. There is some possibility that the procedure could be speeded up next time. In Sudbury, the whole process took very little more than the required two months. No objections were raised and little in the way of

neighbourhood warming up was performed. This raises some concern that there may be an aftermath of local concern when the units are actually placed. The lesson basically is that the process has to be as fast as it reasonably can be and still guarantee a legitimate amount of neighbourhood input.

With regard to site installations, although none have actually been completed yet, we have advance warning that the fire and the plumbing codes could easily be violated without going to some care and cost to avoid this. In addition, in most cases the host households will have to be rewired to allow for the 200 amp service necessary to permit appropriate hook-up. These issues are all surmountable but it would have been hard to pinpoint them without going into a full-scale demonstration.

With regard to legal issues, the units are owned by the province in this demonstration and rented to the occupant to control occupancy. Because the land belongs to the host household, however, this is a hybrid tenure and will be controlled by a licencing arrangement between the host and the province. It is not at all clear yet whether the province is permitted to avoid the Landlord and Tenant Act in this way, or whether the whole issue of controlled occupancy through licence is permissible under the Charter of Rights and the human rights legislation. It is certainly true that the temporary use by-laws may not make specific reference to the control of occupancy under the Planning Act; however, it is also true that many of them have done just that.

Regardless of what precautions we may take concerning the temporary nature of the rezoning and the control of occupancy, it is not at all clear that we will necessarily be able to enforce these stipulations without going through the civil judicial process. We are, of course, hopeful that there will be no difficulties as the project gets into the

Living Laboratory Phase, but this cannot be guaranteed absolutely. There is a considerable amount of trust and goodwill going on here.

The final shock is that the applicants are not senior citizens at all. The main consumer of the granny flat is the adult child, with a lot size sufficiently large and an equally sized concern for the aging parent. We had been directing this towards senior citizens' organizations and had been extremely disappointed by their reaction - in summary "they would not much care to be put out in a dog kennel in their child's backyard." However, whatever limited media coverage was initiated brought forward many adult children who wished to undertake this experiment, whether in the demonstration area or not, and whether they had to buy a unit for temporary occupancy or could rent it in the demonstration project. The response has been very great, but not in the target group we expected.

As we proceed, there will be many more shocks and surprises. This is only to be expected given the tightness with which we control our built environment. Nevertheless, the reception which has been given to the demonstration has been so heartwarming that we are confident some good will come of it. If nothing else, I hope other provinces and municipalities will feel free to risk similar experiments, avoiding the problems that we have incurred and capitalizing on the successes.

MUNICIPAL MECHANISMS FOR THE IMPLEMENTATION OF GRANNY FLATS

by

Gregory S. Romanick

1.0 INTRODUCTION

The concept of granny flats was introduced to the City of Waterloo in 1983 when Dr. Michael Lazarowich of the Univeristy of Waterloo solicited the city's assistance in undertaking a demand and implementation study. As a result of the positive findings of this study, the Ontario Ministry of Municipal Affairs and Housing (MMAH) developed a pilot demonstration program to test the feasibility of this housing concept. In the fall of 1984, the MMAH requested the City of Waterloo to be part of the pilot program with a view to locating four of the granny flats in the city. City council accepted the offer and the program has been ongoing since that time. The paper discusses Waterloo's involvement to date, with particular emphasis on municipal mechanism for the implementation of the program.

2.0 BACKGROUND: THE CITY OF WATERLOO

The City of Waterloo is a thriving municipality of approximately 60,000 persons located in the heartland of southern Ontario. The community has been known historically for its hard work and craftsmanship. The municipal motto is "stability," and this foundation has been more recently paralleled with a reputation for innovation and progressiveness.

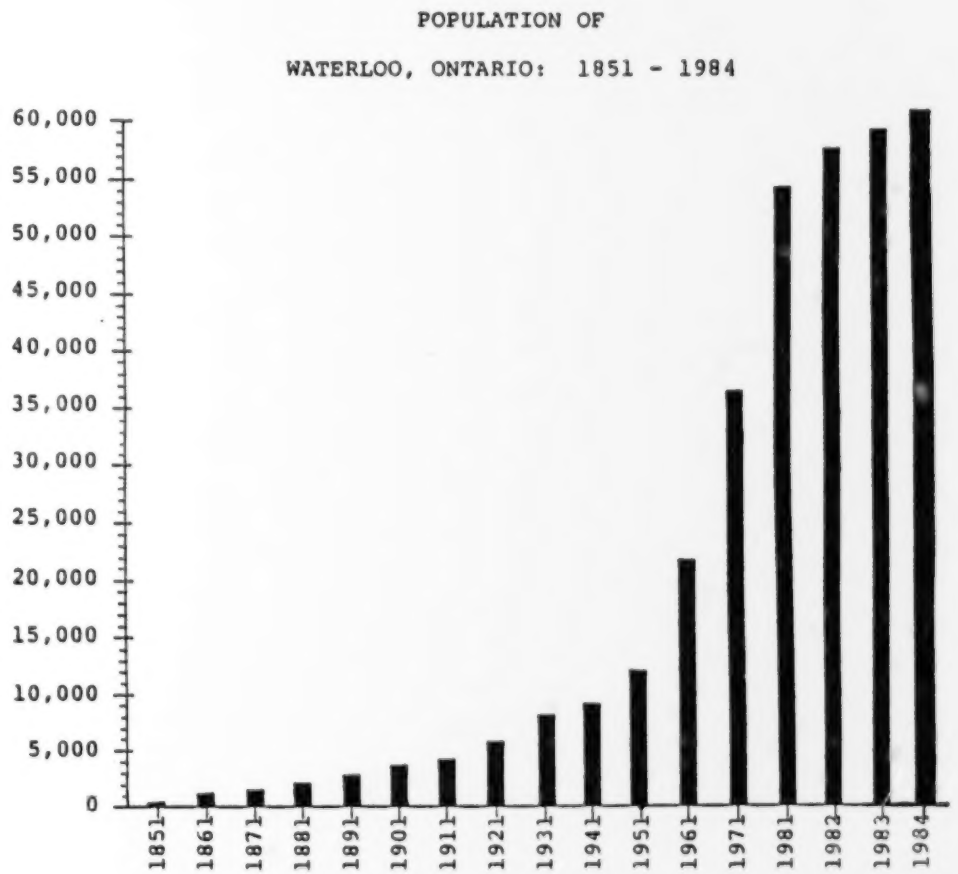
Waterloo's economic vitality, even during the recession of the early 1980s, has resulted in steady growth of the city (see Graph 1). Anchored by noteworthy firms such as Mutual Life, Dominion Life, Equitable Life (insurance companies), N.C.R., Raytheon and Seagram's Distillery, and complemented by the presence of the University of Waterloo and Wilfrid Laurier University, Waterloo's employment sectors have experienced consistent expansion, particularly in high technology fields. Waterloo's 11% population growth between 1980 and 1984 is the fastest growth rate in the Region of Waterloo, and annual value of construction has risen from approximately $30 million in 1980 to $47 million in 1984.

To deal with this rapid growth, Waterloo has had to be progressive in its housing policy. The provision of new housing options and the preservation and intensification of existing housing stock have been a priority. Over the past decade, zoning reform to permit controlled intensification has been implemented in the older, central neighbourhoods, and changes to permit residential uses in the commercial core have been approved. More recently, the city has developed a property standards or maintenance and occupancy by-law. Efforts to accommodate housing for elderly persons and low income families have focussed on private, non-profit developments. The city has worked with several church groups and community organizations to develop tailored zoning for these projects.

Given this backdrop of physical growth and economic prosperity, and a commitment to innovative housing policy, it seems appropriate that Waterloo should accept the challenge of testing the granny flat concept.

3.0 THE IMPLEMENTATION PROCESS IN WATERLOO

For purposes of this paper, the implementation process of the granny



POPULATION graph 1

flats program has been divided into three phases (see Chart 1):

i) the developmental/strategic phase;

ii) the zoning approval phase; and

iii) the monitoring phase.

The program presently is well into the zoning approval phase and the installation of the first granny flat is anticipated fall 1985. The focus of the next portion of this paper will be on the implementation mechanisms utilized in the first two phases. It is particularly noteworthy that MMAH has been extremely flexible in allowing the City of Waterloo and the Waterloo Working Committee to design its own implementation process. The continuing enthusiasm and success of the project has been a direct result of this community-developed process.

It is also worth noting that within the implementation process, the standard zoning by-law amendment process has been utilized as with any other zone change application. This was viewed as an important feature to provide a true test of the zoning mechanism, and it also assured the community of due process.

4.0 IMPLEMENTATION MECHANISMS

4.1 Reporting to Council

Throughout the implementation process, there has been a constant effort to keep the elected officials/decision-makers apprised of the project. This is evident in Chart 1 by the number of reports to city Council. In addition to this constant communication, one of the city aldermen is also a member of the working committee.

Council has been continually involved in the process and this has

CHART 1

THE IMPLEMENTATION PROCESS IN WATERLOO

Phases	Stages
Developmental/ Strategic Phase	Introduction of Concept - Report to Council Council Approval to Proceed (Media) Formation of Working Committee Applicant Generation (Media) Utilities/Agencies Feedback Council Update - Report to Council (Media) "Tea Party" Meetings Applicant Selection
Zoning Approval Phase	Initiation of Files - Report to Council (Media) Informal Hearings (Media) Formal Hearings Recommendation of Sites - Report to Council (Media) - Agreements - By-Law Approval Finalization of Agreements - Report to Council (Media) By-Law Approval Unit Installation
Monitoring Phase	Legislative/Legal Site Planning/Zoning Issues Neighbourhood Acceptance

resulted in support for staff involvement and a generally positive attitude toward the project. This positive political attitude has in turn spilt over into the community.

The importance of maintaining strong political support cannot be over-emphasized since decisions regarding changes to what is often considered "permanent" zoning are necessary. The zoning changes have been both technical and highly politicized in nature. By ensuring that council has a clear understanding of the issues, the process has been able to proceed smoothly.

4.2 The Working Committee

The working committee concept was initiated by the MMAH and has been an integral implementation component. The committee is made up of representatives from the following agencies/interest groups:

- the Ministry of Municipal Affairs and Housing;
- Waterloo City Council (an alderman);
- consultant (Dr. M. Lazarowich);
- North Waterloo Housing Authority;
- Ontario Housing Corporation;
- Waterloo Adult Recreation Centre;
- Waterloo Planning Department;
- a senior citizen from the community.

The committee has been the primary actor in the ongoing administration of the project. This has included decision-making and involvement in the developmental/strategic phase, including methods of applicant generation, interaction with the media, applicant selection, and advice

on technical matters such as unit design, reporting, and legal agreements. The broad range of expertise and interests has resulted in well thought-out strategies and sound decisions.

Of the agencies represented, it is interesting to see how their functions also interface with the project. For example, the city planning department and the city alderman are key actors in the decision-making process to amend zoning by-laws. The North Waterloo Housing Authority is a local, social housing agency funded by the provincial and federal governments and accountable to the MMAH through the Ontario Housing Corporation. It will be assuming the day-to-day administration of the granny flats once they are in place. The City of Waterloo Adult Recreation Centre is a municipal agency which provides social and recreational opportunities for senior adults and also assists local health care agencies in responding to individuals' needs. The agencies represented have, and will continue to have, a direct relationship with the project and the individual recipients.

The committee size has been large enough to provide a diversity of expertise, and yet small enough to be workable. Decision-making has occurred on a consensus basis and there have been no divisive issues.

One problem with the committee approach is that it is not easy to get everyone together, particularly on short notice, and therefore the ability to make quick decisions can be difficult. To overcome this problem, the consultant and the Planning Department representative, in close consultation with the MMAH, have been given some leeway to deal with day-to-day issues. This approach has worked reasonably well.

4.3 Public Input

Public input or participation has been given a high priority

throughout the implementation process. This has produced several very positive results. Firstly, while some isolated opposition has occurred in a couple of neighbourhoods,[1] public support, both on a community-wide and neighbourhood level, has been very strong. Secondly, the information transfer has smoothed the formal zoning amendment process which is often perceived by residents as an adversarial, bureaucratic process. Thirdly, the positive community reaction has sparked considerable media attention which in turn has reinforced the flow of information to the public. Finally, community interest in the project has produced a much wider interest to the point where provincial and even national attention has focussed on the project.

The first stage of the public input program involved what became affectionately known as "tea party" meetings. Upon an application being received, but before final applicant selection or initiation of the zoning amendment process, a meeting was held in the home of the host (i.e., the property on which the granny flat was to be located). Neighbours within a few hundred feet in all directions were invited to the meeting, at which certain members of the working committee provided detailed information regarding the project. One benefit of this meeting was that the working committee became aware of neighbourhood receptivity prior to applicant selection. Also, neighbours were not "shocked" upon receiving a formal notice of a zoning by-law amendment when the rezoning process was initiated.

Two additional public meetings were held in the zoning approval phase. The first, referred to as the "informal public hearing," was held prior to preparation of a planning staff report. The second, known as the "formal public hearing," a requirement of Ontario's Planning Act, occurred at the council meeting at which the planning staff report was considered. At both meetings, the entire city council is present and all persons wishing to speak in favour or against the proposal are

permitted to speak. Typically, after the neighbourhood "tea party" meeting, the subsequent hearings were generally uneventful - although it should be noted that to date, applications from the more contentious neighbourhoods referred to earlier have not been selected to proceed.

4.4 Use of the Media

The media have played a very positive role in transferring information and in applicant generation. A formal press conference was held at the initial applicant generation stage where newspaper, television and radio representatives were introduced to the concept. Information handouts were made available and photos, slides, and a model were displayed. The model proved particularly beneficial as it appeared in the local newspapers and on the local television network. The initial applicant generation efforts were reasonably successful, although in the end only two sites were taken into the zoning approval phase.

It seems that many people considering the option, and even many of those who actually applied, were tentative due to the newness of the concept and the major life-decision involving two families. With the assistance of local media, a second media effort was launched and the working committee is presently considering a new round of approximately six applications. It is noteworthy that applicant generation was able to occur strictly through media attention and cooperation, and without the use of formal advertisements.

It is also interesting to point out that each time a report was considered by council, some story appeared in at least one of the local media (see Chart 1). This fact seems to reinforce the value of thorough reporting to council.

4.5 Zoning - Temporary Use By-Law

To permit the additional granny flat unit on the host property required an amendment to the zoning by-law. From very early in the implementation process it was felt that it would be best to utilize site specific amendments to accomodate the four pilot units. Also, it was fortunate that the new (1983) Ontario Planning Act included a section (Section 38) permitting temporary use by-laws (TUB). The TUB is able to permit a use on a temporary basis for up to three years. Prior to the lapsing of the by-law, consideration may be given to extending the permitted use for an additional three-year period. There may be an indefinite number of extensions, although each time an extension is considered it must go through the entire zoning amendment process as set out in the Planning Act. The maximum three-year term of the TUB was ideally suited to the pilot program which is to have a three-year duration. Potential recipients were informed early in the pilot program that only a three-year occupancy could be guaranteed.

The primary issue with the granny flat concept appears to be ensuring that the unit will be located on a property for a temporary period of time. To date, one of the few criteria for qualifying for a granny flat has been that the unit is to be occupied by a parent or parents of host occupants. Once the granny flat is no longer required by the parent or parents, it is to be removed. The TUB works reasonably well within the limited scope of the pilot program, that is, the provision of four units. However, one can see that on a large-scale program basis, it would be administratively impossible to utilize this system.

Another problem with the TUB, or any form of zoning control, is that case law (Bell v. The Queen, 1979) has indicated that zoning cannot be used to determine "who" can use land, as it could become

discriminatory. It has been Waterloo's position that the primary control for temporary use of the granny flat and who may occupy the unit rests in provincial ownership and "renting" of the unit. Unless zoning laws can be changed, this will continue to be the case.

Issues that have been raised in the rezoning process have included depreciation of property values, aesthetics, servicing, tax assessment, parking and a number of items which could come under the heading of site planning. These site planning issues include quantitative aspects such as setbacks, coverage, and lot size, and also qualitative aspects such as privacy and landscaping.

For purposes of the pilot program there were no pre-set criteria for minimum setbacks and lot size, or maximum lot coverage. It was felt that to adequately test the concept, it would be better to consider a variety of lot situations. Consideration of site planning issues occurred on a site-by-site basis at the applicant selection stage. The TUB for each site addresses yard setbacks and, in future, zoning controls could be considered for minimum lot size and maximum lot coverage.

The qualitative aspects of site planning have been more difficult to address because of the temporary nature of the granny flat and the high costs of ameliorative site planning measures such as fencing, landscaping, etc. Generally, this issue has been dealt with on a site-by-site basis with the applicant. This will likely become an issue of greater importance when consideration is given to expanding the granny flat demonstration into a full-fledged program.

4.6 Legal Agreements

Two agreements have been utilized to address various implementation concerns.

Firstly, an agreement between the province and the municipality sets out the obligations of each of these parties. The municipality's responsibilities generally include assistance in applicant generation, record keeping and access to files, and agreement to consider the necessary zoning amendments. The minister's (i.e., the Minister of Municipal Affairs and Housing) responsibilities are primarily to provide and locate the four granny flats and to enter into licences (a form of agreement) with the host applicants. The agreements between the province and the municipality also set out the role and duties of the working committee.

Secondly, there is an agreement, or more accurately in law, a licence, between the province and the host applicant. This agreement ensures temporary use restricted to a specified parent or parents of the host. It also addresses other matters such as (rental) fees, maintenance, alterations, improvements, insurance, damages, etc. This agreement is to be registered on the title of the host property.

On the issue of removal of the unit, there are still uncertainties with regard to implications of the federal Charter of Rights and the Ontario Landlord and Tenant Act. For example, a granny flat user may wish to retain use of the unit for another elderly relative or acquaintance once it is vacated by the parent or parents. The fear is that the user would refuse to permit removal of the granny flat, and in the longer term it might be occupied by certain users for which the lot and neighbourhood are not well-suited (students, a second family, etc.). A major difficulty in resolving the agreements was just

how far the province would be expected to go (i.e., into the courts) to force removal of a unit if problems arose. While the province indicated a commitment to seeing the unit removed, they could not agree (within the agreement) to exhaust all judicial remedies (i.e., taking a matter to the Supreme Court of Canada), as there are too many unknowns. While this is a weakness in the system of agreements, the perception is that the level of risk is low.

The preparation of the legal agreements has been one of the most sensitive tasks in the implementation process. Due to the technical nature of the documents, and the multiplicity of issues, preparation of the legal agreements should have started earlier in the process.

4.7 Implementation Mechanisms in the Monitoring Phase

Mechanisms for monitoring various aspects of the pilot units once they are in place still need to be developed and discussed. The MMAH has carried out some work in this area, and it is expected that there will be continuing dialogue with both the users and the surrounding neighbours. With the help of information and opinions contributed by these persons, it would be worthwhile to comprehensively examine the characteristics of all of the sites and to relate this information to users' and neighbourhood satisfaction. From this exercise, performance requirements can be developed. It will also be important to consider unit design, not only in terms of user satisfaction, but also as it relates to site planning, aesthetics, serviceability, ease of transportation/installation, etc.

5.0 CONCLUSIONS AND OBSERVATIONS

For the most part, the granny flat concept has been very positively received both politically and community-wide. While in many respects this is due to the fact that the idea is socially sound, communication

with political representatives and public participation have likely cultivated this attitude.

Qualitative site planning issues on a site-by-site basis present difficulties as there does not appear to be a simple mechanism to address these issues. This problem deserves further attention. Should the pilot project develop into a full-fledged program, it may be appropriate to have a landscape architect as a staff person with the unit distribution agency. This role might also be fulfilled by a consultant on a retainer basis. In either case, site planning measures to address aesthetics, screening, privacy, etc. will need to be developed and applied collaboratively with individual applicants on a site-by-site basis.

As more experience is acquired with the granny flat concept, zoning will be able to incorporate community-accepted performance requirements. These could include minimum setbacks and lot area, and maximum lot coverage. However, with present legislation, zoning does not appear to be a suitable tool to control occupancy or temporary use.

In the longer term, if the demonstration is to become a bona fide housing option available on a wide-scale basis, either new legislation, or legislative changes, will be required at the provincial level and possibly the federal level. Changes could be considered to existing zoning legislation to permit "proactive discrimination" in terms of specifying "who" may use land. Specific reference as to what uses could be affected by this type of zoning would be necessary (e.g., in this case granny flats, although other housing forms such as senior citizen apartments, housing for the handicapped, etc. might also warrant consideration). Present temporary use zoning provisions might also be modified to permit longer periods of temporary use, with lapsing of the permitted use dependant on an event (e.g., the unit being vacated by the parent

or parents). Alternatively, program-specific legislation might also be explored. This could take the form of a special act to provide for the provision of granny flats. Such an act could give powers to a specific agency to restrict occupancy of granny flats to certain age groups and/or relatives, and to enable unit removal when these criteria were no longer satisfied. In either instance, legislative changes will have to be considered in the context of the federal Charter of Rights and, in the case of Ontario, The Landlord and Tenant Act.

NOTES

1. It is interesting to note that the highest level of opposition was received in neighbourhoods typically occupied by persons considered to be within the "upper middle" to "upper class."

THE PERSPECTIVE OF THE USER IN THE ONTARIO GRANNY FLAT DEMONSTRATION PROJECT

by

Michael Lazarowich

1.0 INTRODUCTION

This paper examines the perspective of the granny flat user or occupant in the Ontario demonstration project. The author's granny flat feasibility study, market assessment and implementation study, and completed applications in the Waterloo demonstration project are used to develop the issues on the granny flat project.

The perspective of the user or granny flat occupant directly involves the host family. The host family has a granny flat placed on its property enlarging the capacity of the home to accommodate an immediate family member - an elderly parent. The host family "invites" the parent to live on the property. This invitation is the route most of the elderly persons wish to take because they "don't want to impose." The preference for the invitation route is strongly indicated in the author's market assessment study and in the demonstration project where, in Waterloo, all applications for a granny flat except one were initiated by a host family. The occupant of a granny flat is not an independent actor but is intertwined with the host family. The host family provides a context, and conditions the occupant's perspective. Thus, to fully understand the granny flat user, it is necessary to examine user issues relating to the occupant and the host family.

2.0 USER ISSUES

2.1 Lifestyle History

An examination of the past lifestyle of the occupant and host is necessary to understand the issues associated with users of the granny flat. It is important to know the occupant's past lifestyle, activities, associations, and amount of involvement and integration in the home community. A history of the degree and kind of involvement in the home community would indicate the degree and kind of involvement the occupant might seek (expect) in the host community.

An indication of the kind of relations and associations that have occurred between the occupant and host family in the past is evident in Waterloo. The applicants have been families that have had close ties over a long period of time, have lived together over a number of years, have a strong commitment to each other, live in close proximity, and are strongly predisposed to an intergenerational lifestyle.

2.2 Current Situation

The living situation of the occupant prior to moving into a granny flat indicates some of the conditions that might predispose persons to move to granny flats. In Waterloo, the occupants lived in rented or owned accommodations, and the host family was in daily contact to assist the parent with daily functions. The parent was looking to move from his/her present housing. The host had considered having the parent come to live with family, but the family's home was not large enough or did not offer the parent privacy or independence. The granny flat provided the opportunity for the parent and host family to be near but independent.

The benefits the confirmed Waterloo applicants (occupants and hosts) gave for granny flats were: to be close to family; comfort and security; and to live independently but where help was near if needed. The reasons given by Waterloo applicants (hosts) that withdrew their applications were (in descending frequency): many families had parents who were living in their own homes and were still very independent; rent of the granny flat or the property tax was too high for the parent; parent or host family members were not in favour of the concept; parent would like to see an actual granny flat before moving into one; no firm guarantee of having the granny flat after the three-year demonstration; and parent has made other arrangements for accommodation. The reasons for choosing or not choosing the granny flat by both occupants and hosts provide indicators of situations and conditions affecting use of a granny flat: mobility, independence, health, affordability, and security of tenure.

2.3 Expectations

The expectations that occupants and hosts have of granny flats indicate important user issues. The area of occupant and host family relations and responsibilities raises an important set of issues. The author's market assessment study strongly indicated that the elderly occupants want to have an explicit understanding of host and occupant responsibility - many "don't want to be 24-hour baby sitters." Arrangements have to be made on responsibilities of transportation, shopping, visiting, child care, and granny flat maintenance. Living in a granny flat was seen by many elderly as more than just accommodation. There must be strong consideration given to the other functions that persons are involved in if a granny flat project is to be successful: access to shopping, recreation, medical services, volunteer work, and so forth. These support services and functions are given serious attention in the demonstration project. The specific type of support

services/functions the elderly occupants require is indicated by the amount and type of involvement that the persons had in their home community, as discussed earlier. The current involvement of the occupant in the home community will indicate the type of functionally equivalent involvement in the host community (ways of integrating into host community) that should be provided to minimize the uprooting of the occupant. The use of a granny flat is a major decision for two families, involving a novel concept and commitment to accommodation that they have not actually seen. Having explicit discussions on responsibilities and support services will help minimize the impact on the life plans of the host family and the occupant.

Expectations related to the granny flat itself provide another important set of issues to be examined. The extent of privacy in the flat, accommodation of friends and visitors, private outdoor space around the flat, and economic costs of rent and utilities are important issues for the occupant. In the market assessment study, the elderly persons felt that the granny flat was large enough for one or two persons but might not be large enough to accommodate visitors. About one-third felt they would find the granny flat physically confining. Most expected to live in the flat five or more years. The private outdoor space around the main house is an important issue to the host family. The flat's aesthetics, size, layout, location on the lot, comfort and safety are issues that are important to the occupant and the host family. In the market assessment study, most respondents preferred the floor plan where the kitchen was to the right of the front door, the living and dining area to the left, with the bedroom behind the living area and bathroom behind the kitchen. One-half of the respondents preferred to have the flat in the sideyard and the other half preferred either the backyard or sideyard. They preferred to be situated on the lot so they could see the road or street. Two of the Waterloo granny flats can be situated to view the street. In the

market study, one-quarter of the Waterloo hosts felt that neighbours would accept a granny flat in their neighbourhood, one-half of the hosts felt neighbours would not accept a granny flat, and one-quarter were not sure. As it has turned out, there has been very little neighbourhood resistance to the granny flat.

As the occupant's age and vulnerability increase, important issues need to be addressed that deal with future plans for support services as the occupant becomes less independent. These issues are just as important as the roles and responsibilities of occupant and host family when the occupant moves into the flat.

2.4 Performance

The above expectations identify important user issues that need to be examined in the demonstration project. The description and measurement of these expectations provide the "direction" of performance expected in the project for user satisfaction and project success. These measures of expectations serve as the benchmarks by which to gauge performance. The measures of performance or "meeting of expectations" are important for project monitoring and corrective feedback, feedforward, evaluation of the project, recommendations and procedures for implementation of granny flat projects in other communities.

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THE DESIGN AND TECHNICAL DEVELOPMENT OF PLUS: ONTARIO'S GRANNY FLATS

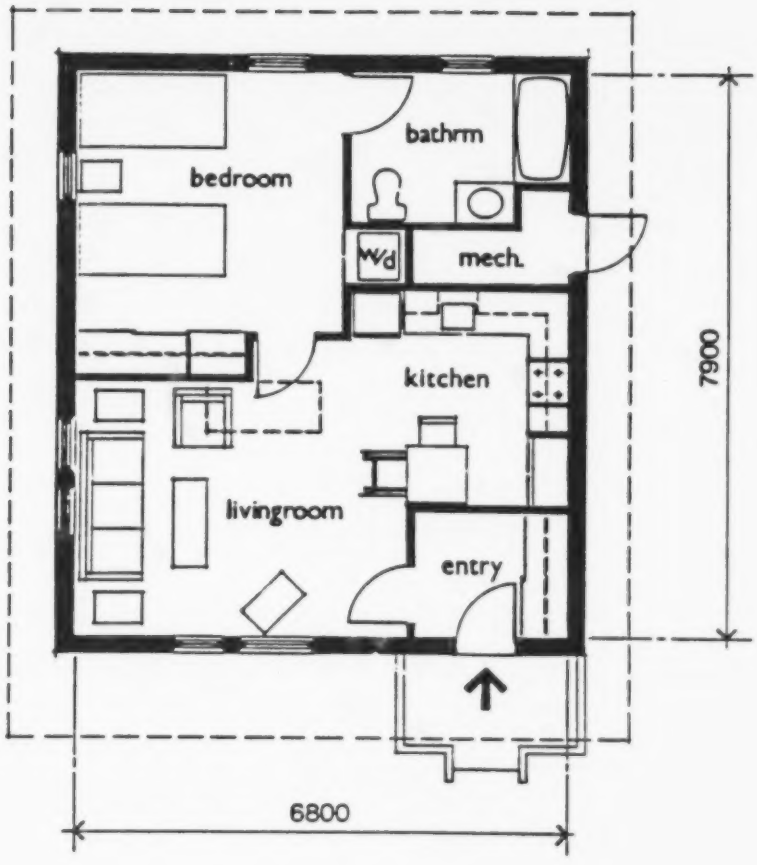
by

Joan C. Simon

1.0 INTRODUCTION

The Ontario Ministry of Municipal Affairs and Housing created the PLUS (Portable Living Units for Seniors) Demonstration to test the feasibility of the Australian granny flat concept in Canada. Since the introduction of granny flats in Victoria, Australia in 1972, this housing form has gained acceptance across Australia and a couple of thousand units are now in use. In the United States, elder cottages or ECHO housing has been referred to as the "ripple," if not the wave, of the future.[1] The concept has been advocated by such diverse groups as the American Association of Retired Persons and the Urban Land Institute.[2] Articles appearing in the Wall Street Journal, Washington Post and McCalls Magazine have been picked up by wire services, raising consumer expectations across the country. However, only two specifically designated granny flats are known to have been built. Zoning regulations, community objections, marketing strategies, etc. have frustrated attempts to deliver this housing option.

The Ontario government became interested in the granny flats as an innovative way of providing another non-institutional living option for our aging population. Also, the units could make sensible use of the costly existing infrastructure in established residential areas. The



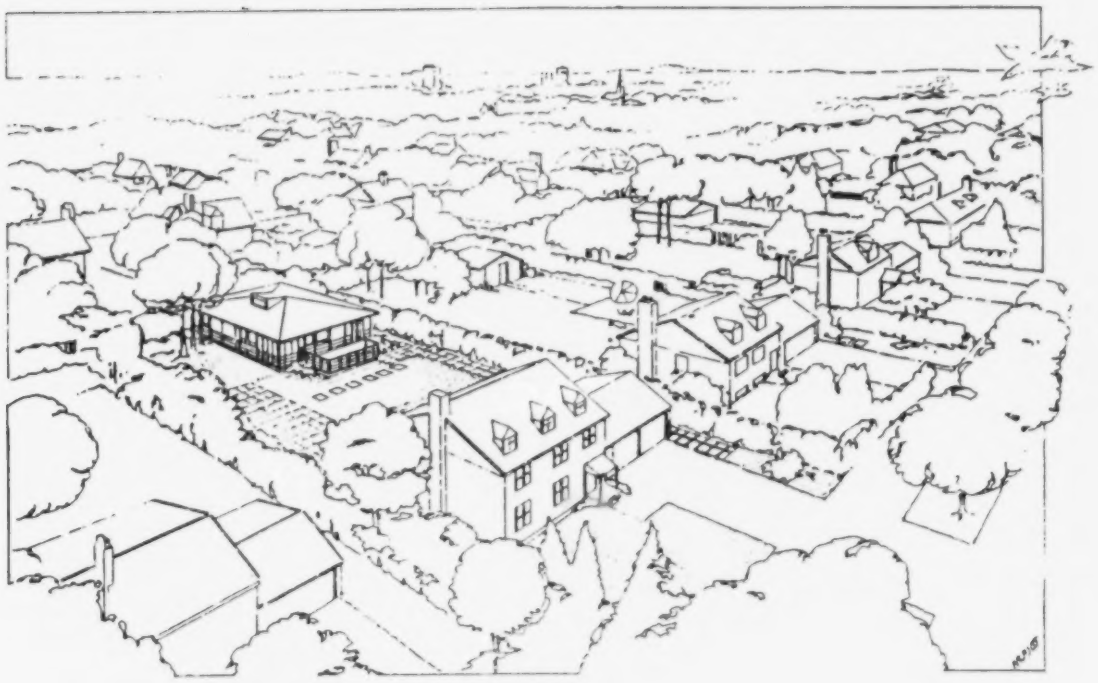
PLUS

UNIT TYPE A

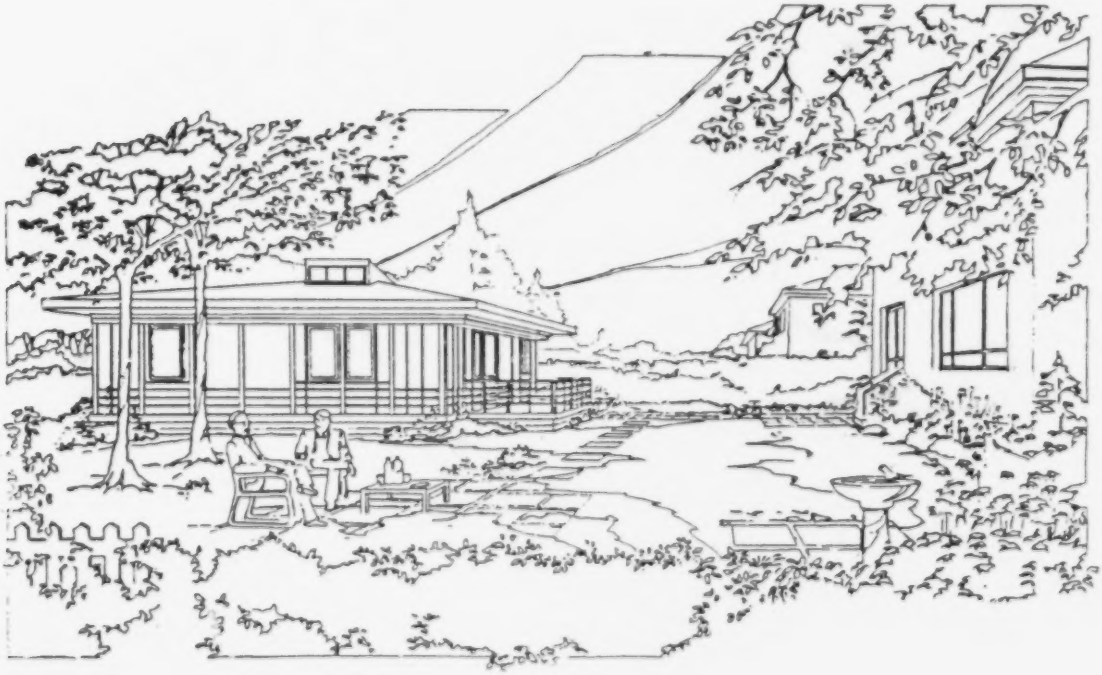
Two persons disabled
Ministry standards
53.7 m² 578.3 ft.² net

0 1 2 3 4 5 6 7 8 10 15 ft.
0 .5 1 2 3 4 5m.

SIMON
ARCHITECTS & PLANNERS



Views of a Granny Flat.



addition of this new product could expand the markets of industrialized building manufacturers.

2.0 UNIT DESIGN

Simon Architects & Planners were commissioned to undertake the aesthetic and technical design of the units. The challenge of the product design is inherent in the official ministry definition of PLUS as a "temporary, movable, detached dwelling unit...situated on the lot of the host household."[3]

Product image was seen as key to public acceptance. "Temporary and movable" were product characteristics traditionally linked with mobile homes which, despite efforts by the manufactured housing industry, still convey a negative message to many Ontarians. The PLUS unit had to avoid a temporary appearance. It had to look like a place where the senior comsumer would want to live and that the host family would accept into their backyard.

To defuse neighbours' apprehensions about negative impacts of the units on property values in the area, it was essential to create a dwelling which would be an attractive addition to any residential setting. It would have been possible to design a kit of stick-on facades to try to decorate the basic unit to echo the design of the host house. This approach would have been uneconomical, would have ignored the problem of relocation, and probably would have resulted in an objectionable ticky-tack appearance. On the other hand, a unit bland and neutral enough to be nondescript in any context would have run the risk of having an unacceptable shed appearance, while a "bold architectural statement" type of design would have been inappropriate for a small-scale temporary infill building.

We decided to create a building that was more of a landscape element than an architectural statement; the unit was designed to be seen as a pavilion in the garden.[4] The positive feedback we have had from the consumer panel, the general public and those families who have been selected as host households for the demonstration confirm the aesthetic success of the units.

2.1 Construction Method

The aesthetic and technical design aspects were tightly interwoven. The first step was to review and evaluate the appropriate methods of construction.[5] The key factor in selecting a construction system was the requirement of portability. The units had to be capable of being relocated to new sites on repeated occasions during the life of the unit with a minimum of cost, damage or impact to the backyard. Prefabricated dwellings are not normally constructed to be removed from a site and re-used; even mobile homes are rarely moved.

Other important factors which were evaluated included the assurance of a high quality of construction with a minimum of onsite supervision, the initial capital cost of the unit and relocation expenses. The method of construction had to be applicable in different parts of Ontario, and the speed of erecting the units on site was a consideration. The capacity of the prefabricated construction industry to produce units built to the specified quality was unclear and required study.

Preliminary industry review identified three basic types of industrialized buildings to investigate in detail: mobile homes, modular or sectional forms of construction, and panelised construction.

Mobile homes, also called manufactured homes, are characteristically not mobile but tend to remain in one place once delivered to the site. They

have traditionally provided a low cost housing option and are more numerous in the western provinces and in the United States. Their continuing evolution is making it increasingly difficult to distinguish these units from modular or sectional construction.

Modular or sectional construction forms are essentially the same. Both involve the factory fabrication of a unit designed to meet requirements for production-line assembly and transportation over existing roads and highways to the chosen site. The sectional home is constructed of two or more units, whereas the modular home could be constructed of one unit. Both comprise not only the shell of the dwelling modules, but also the mechanical equipment, wiring, plumbing, and interior finishes and fixtures. They are generally built of slightly modified standard frame construction. (Modular/sectional homes are designed to be transportable - on highways).

Panelised construction comprises either factory or site fabrication of panels to a given modular size (e.g., four-foot wide wall, floor and roof sections). Alternatively, entire sections of walls, floors, etc. may be prefabricated. The panels may be non-structural and may be joined to the structural frame on site, or they may incorporate all structural requirements thus speeding erection. With some important exceptions, interior finishes, plumbing, wiring and ductwork are not generally incorporated during panel fabrication.

Outlying smaller communities cannot realistically be served by a large volume, centralised factory except at considerable cost. Local labour could theoretically manufacture the modules, but the demand for that one area may determine that locally produced, panelised construction would be more cost effective. Add to this the necessity of using a crane for the placement of units and the proposal for sectional or modular unit construction within remote areas is far from ideal.

Within urban areas, especially established neighbourhoods, access problems are also to be found. Narrow lots with limited or no side access, extensive mature tree planting, narrow streets with street parking, hydro and high roof lines would all make cranage a necessity in the placement and removal of modular/panelised or mobile units. The costs of such installation are not prohibitive where cranes are available, and their use tends to subject the unit to less stress than other methods. Panelised construction has the advantage that the panels can be man-handled onto constricted sites.

Apart from the above limitations, mobile and modular/sectional units can be removed and relocated relatively easily. Panelised units generally present problems of requiring the vapour barrier, internal finishes, wiring, etc. to be installed after erection of the unit and be removed before relocation of the unit. To permit both repeated relocations with minimal damage and state-of-the-art levels of insulation, the panel design would have to be quite complex. Certain applications of expanded polystyrene insulation may eliminate the vapour barrier problem. Sophisticated gasketing systems are in use in Sweden and control joints in the interior finishes may allow the materials to remain in place. However, we were unable to identify a panelised system available in Ontario which would solve all the problems of relocation satisfactorily.

Factory fabrication (whether mobile home, sectional or panelised) makes quality control far easier than with site construction. Indoor conditions, a large degree of machine-handled operations, and systemised supervision offer the potential of consistent results.

Sectional/modular housing fabricators have established high standards of construction, and both manufacturers which we visited are routinely producing R2000 houses.

As mobile home manufacturers in the past have serviced the low end of the market, they have not traditionally been associated with high quality construction and the governing CSA Standards fall below those advocated for this demonstration. Nevertheless, their evolution is continuing and it is increasingly difficult to differentiate between modular and the more progressive mobile home manufacturers. It was decided that the units should be designed in such a manner that mobile manufacturers could compete if they chose to modify their standard product to meet the PLUS construction requirements.

2.2 Layout and Design Features

The constaints inherent in the construction system have a significant influence on both the appearance and the internal layout of the units.

Panelised units offered the potential of the greatest flexibility in layout, as a carefully detailed system could be assembled in a variety of configurations in response to differing siting needs. With modular co-ordination of the panel dimensions, the units essentially could be designed by numbers, with the location and size of windows, doors, etc., responding to individual requirements.

Modular/sectional and mobile homes are limited by the more stringent dimensional restrictions governing their transportation on the highways. Within these restrictions, however, a large amount of customisation of units occurs. Sectional units, in particular, are capable of considerable flexibility in plan form, section and appearance. However, cost penalties are inevitably incurred by increased complexity of construction and decreased standardisation in the production line.

In order not to preclude any potential manufacturer, the units were designed employing dimensions suited to panelised construction and with

a height and width configuration within the restrictions governing highway transportation of modular and sectional buildings.

Manufacturers were invited to participate in an industry panel to review design concepts and the technical approach. Their input ensured that no costly details were included and that the assumptions about various forms of manufacture, transport site-assembly and disassembly were reasonable.[6]

A series of unit plans were prepared for review by ministry staff and a consumer panel. The dimension of the units conformed to the Ontario Ministry of Housing Technical Guide for Senior Citizen Housing. These standards establish minimum areas for individual rooms, circulation spaces and storage areas which are modest, but which exceed granny flat designs used in Australia, England and the United States. The requirement for wheelchair accessibility further increased floor areas.

After input from senior citizens on the consumer panel and ministry staff, it was decided to build two designs for the demonstration project.[7] the 672-square foot, two-person unit (which is 24 feet by 28 feet) meets ministry standards, including those for wheelchair accessibility, in all respects except long-term storage. It was felt that these sort of infrequently used and bulky items could be stored in the host house if necessary. The 528-square foot, single-person unit (22 feet x 24 feet) was reduced slightly below ministry's standards to create a unit with overall dimensions which could more readily be accommodated in standard Ontario backyards.

Initially the units were designed with window openings in only two walls to prevent overlooking of neighbouring gardens. However, the consumer panel felt that a kitchen window was highly desirable so an additional window was added.[8] The units have entry vestibules for energy conservation and the design allows the location of the entry to vary with site conditions.

A number of design features cater to the special needs of the elderly. Ambient lighting levels are high, with care taken to avoid glare. Because background sounds can be very disturbing to people with a hearing impairment, air supply ducts will be dampened, materials with reasonable acoustic qualities used, and good sound insulation built into the exterior walls. The elderly and young children are most susceptible to poor indoor air quality. The installation of a mechanical ventilation system incorporating an air-to-air heat exchanger will provide healthy air changes while conserving energy.[9]

To minimize servicing costs and disruption to the host site, the bathroom and "wet" kitchen counter are located adjacent to the mechanical room. This arrangement allows all plumbing pipes and fixtures, all heating and ventilation equipment and ducts, and the electrical panel to be preassembled and delivered as one unit on site. Units are equipped with standard bathroom fixtures (bathtub, toilet, sink with vanity) and a single kitchen sink. Plumbing will be roughed-in for dishwasher, washer and dryer. The consumer panel felt that these appliances were not needed and washer and dryer in the host house could be used.

The water supply, sewage disposal, hydro-electric supply, telephone, cable TV and intercom/alarm connect into the services in the host house. If the point of connection is above the frost level, the service trench will be insulated. In Sudbury, where one of the sites has rock at grade, a utilidor (an insulated linear box with a tracer heater cable) will be used.

If gravity feed cannot be achieved, a small submersible pump is used to pump sewage to a point where it conveniently joins the sewage stack in the host house.

The hydro loads of the PLUS unit are estimated to require a 60 A 240 V

subservice from the primary dwelling's panel. A few of the demonstrator host houses which did not have 100 A service required upgrading to contemporary standards.

Before the units were finalized, a meeting was arranged by the ministry staff with representatives of all the utility and service organizations: e.g., the city engineer, hydro, police and fire departments, telephone company and post office. There was a strong supportive spirit and useful suggestions were made while no major technical problems were foreseen. Also, the insurance companies saw no difficulties with the concept.[10]

The ministry tendered the 12 demonstration units in May. A total of nine firms bid. Tenders were evaluated by an outside consultant with extensive experience in the house building industry in Ontario. Two manufacturers have been selected and the units are now in production in their plants. The Ottawa builder has built more than 1000 conventional houses during the past 12 years while the Hamilton firm has concentrated its production on the manufacture of portable classrooms, offices and trailers.[11] In two different ways, the ministry's idea of expanding the market for existing manufacturing firms is being met.

The cost of the units is on budget. As we anticipated, there is very little difference between the price of the 528-square foot, one-person unit and the 672-square foot, two-person model because in both cases the expensive items have to be identical: e.g., bathroom, kitchen, service core and connections. Even the number of windows, doors, external and internal corners are virtually the same.

Municipal support and interest has been excellent and the demonstration was expanded to three sites at the request of the planning board in Sudbury.

Host families and grandparents have been selected and will be moving in in time for Christmas. Then the final stage of the evaluation will begin: testing the technical aspects of the units and the social benefits of living in a pavilion in your children's garden.

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For further information on any aspect of the Institute, please contact:

Dr. Alan F.J. Artibise, Director
Institute of Urban Studies
University of Winnipeg
515 Portage Avenue
Winnipeg, Manitoba R3B 2E9
Canada

Telephone: (204) 786-9409